



**SBPRA/Business Gateway (BG)  
Q2 FY06 Data Call  
General Instructions**



**Please follow these instructions to complete the SBPRA/BG Q2 FY06 Data Call:**

**Sending Instructions:**

1. Complete the Q2 2006 data call by the OMB deadline of **March 31, 2006**.
2. Rename the Data Call Instrument excel file to reflect your agency name and date e.g., BGQ2DataCall-NS [Agency Name] 03-22-2006.xls.
3. Each agency's representative should submit ONE complete data call response for the entire agency. Email your Agency data call response to the following two addresses:
  - Shivani Desai, BG Program Manager at [Shivani.Desai@sba.gov](mailto:Shivani.Desai@sba.gov)
  - Business Gateway Program Management Office at [BGPMO@sba.gov](mailto:BGPMO@sba.gov)

**General Instructions:**

In preparation for the Data call please complete the following steps:

1. Verify you have received the following files:
  - **SBPRA BG Data Call DATA DICTIONARY.xls** - an excel spreadsheet defining the content (i.e., Resource Types and Data Fields) requested for this data call.
  - **BGQ2DataCall-NS.xls** – the survey instrument to fill out and submit to BG
2. Open the Data Dictionary (**SBPRA BG Data Call DATA DICTIONARY.xls**) and click on each of the three tabs at the bottom of the spreadsheet to familiarize yourself with the definitions:
  - a. **Tab 1 - Def of Compliance Assistance:** explains what BG means by “Compliance Assistance.” It is important that you read this definition to understand the scope of the data call and what the BG is looking for.
  - b. **Tab 2 - Resource Types:** explains the twelve types of web resources BG requests. Click on the URL links listed to see examples of each resource type. In addition to the twelve data types, the bottom of the Resource Types worksheet BG lists the resources not requested in this data call.
  - c. **Tab 3 - Data Field Definitions** defines each of the data fields in “BG Q2 FY06 Data Call.xls”.
3. The Data Call Instrument: **IMPORTANT: Before you open** the Data Call Instrument, you must follow these instructions. The Data Call Instrument contains macros (simple computer programs). Since macros may create a security alert for your version of MS Excel, please follow the procedure outlined below:
  - **Open** MS Excel
  - From the Menu Bar, choose **Tools**
  - Choose the **Macro** label (you may have to expand the drop-down)
  - Choose **Security** on the expanded panel
  - On the Security pop-up window, **Security Level** tab, choose **Medium**
  - Click **OK**



- You can now open the Data Call Instrument (**BGQ2DataCall-NS.xls**)
- When MS Excel opens, it may display an alert. Choose the “Enable Macros” button, and the program will start.

IMPORTANT: When you are completely finished with this project, you should reset EXCEL to your previous macro setting: Retrace the steps outlined above, and chose **High** instead of **Medium** on the Security level tab.

4. Save the Data Call Instrument (**BGQ2DataCall-NS.xls**) to a directory on your computer.

IMPORTANT: Do not try to enter data into the file before saving it to a directory: Opening the file directly from the email and entering data into it may cause you to lose all your data. To avoid this, right mouse click on the file and save it to a directory you want to use for this data call.

5. Validate the SBPRA data your agency submitted to OMB last year. Go to:  
[http://www.whitehouse.gov/omb/inforeg/sbpri\\_non-cabinet.html](http://www.whitehouse.gov/omb/inforeg/sbpri_non-cabinet.html) and find your agency.
  - a. Validate the SBPRA Single Point of Contact:
    - i. If the POC is accurate, enter the POC’s name and contact information into the POC screen in the Data Call Instrument. (See section A. Enter Contact Information)
    - ii. If the POC has changed, enter the name and contact information for your agency’s new SBPRA POC. If your agency has not yet appointed a new SBPRA POC, enter the person’s name responsible for completing your agency’s data call, but do not check the box “SBPRA POC.”
  - b. Validate resources (URLs):
    - i. If the URLs are still valid, enter them into the Data Call Instrument (see Section B. Add New Resources)
    - ii. If the URLs are no longer valid, do not enter them into the Data Call Instrument.
6. Identify other potentially applicable compliance assistance resources on your agency website.

NOTE: This is the most time intensive step.
7. Evaluate each identified resource against BG’s criteria below:
  - a. Does the URL meet BG’s definition of compliance assistance? See DATA DICTIONARY, Tab 1 - *Def of Compliance Assistance*.
  - b. Is the URL one of the twelve resource types BG requests? See DATA DICTIONARY, Tab 2 - *Resource Types*.
8. Open the Data Call Instrument.



9. If the resource meets the above criteria, complete the Data Call Instrument forms for each identified resource as described in the next section titled *Data Call Instrument Instructions*.

### **Data Call Instrument Instructions**

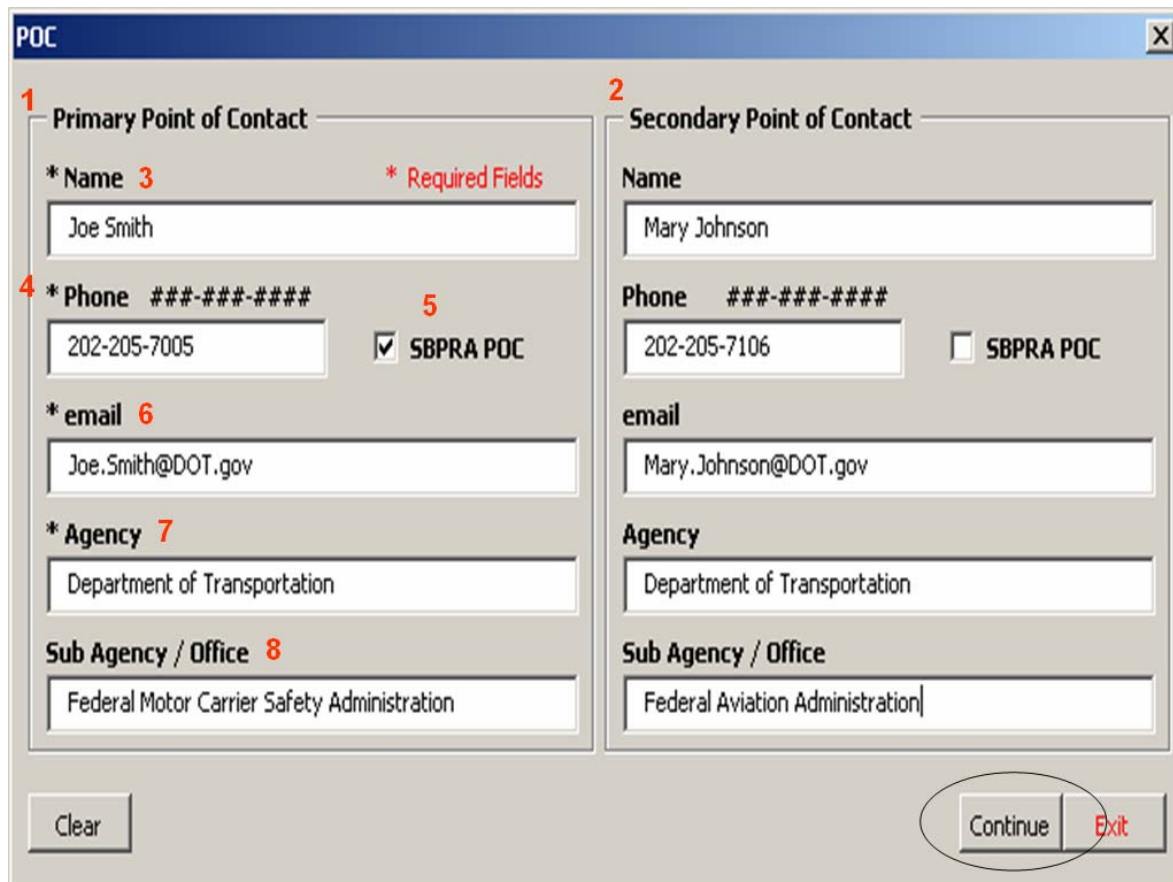
These instructions explain how to fill in the Data Call Instrument.

**Note:** Data field definitions for each screen are located in the DATA DICTIONARY document and correspond to the numbers highlighted in red in the screen shots below.

#### **A. Enter Contact Information**

##### **POC Screen**

Please enter the contact information for the Primary and Secondary Points of Contact, and click “Continue.”



**POC**

**1 Primary Point of Contact**

**\* Name 3** \* Required Fields

Joe Smith

**4 \* Phone ###-###-####** 5

202-205-7005 ☒ SBPRA POC

**\* email 6**

Joe.Smith@DOT.gov

**\* Agency 7**

Department of Transportation

**Sub Agency / Office 8**

Federal Motor Carrier Safety Administration

**2 Secondary Point of Contact**

**Name**

Mary Johnson

**Phone ###-###-####**

202-205-7106 ☐ SBPRA POC

**email**

Mary.Johnson@DOT.gov

**Agency**

Department of Transportation

**Sub Agency / Office**

Federal Aviation Administration

Clear

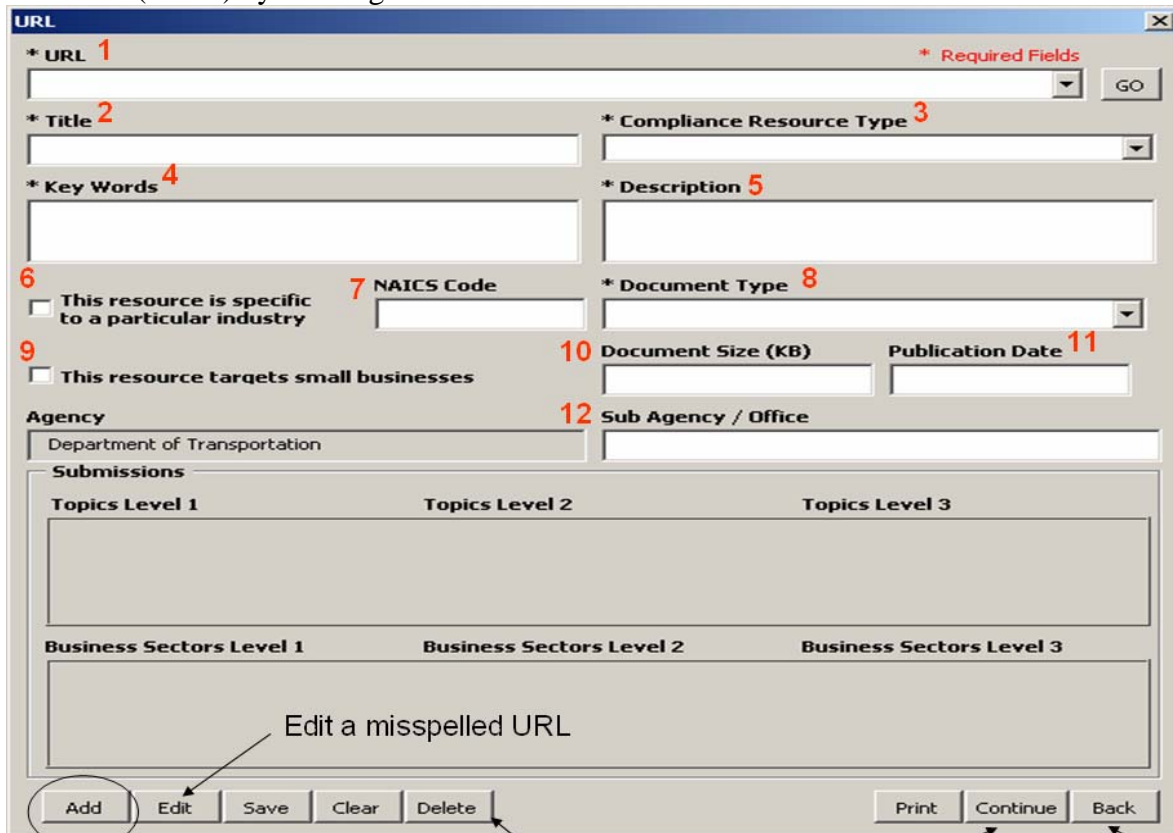
Continue Exit



## B. Add New Resources

### URL Screen

This screen includes general information regarding the compliance assistance URL. Add resources (URLs) by clicking on “Add.”



The screenshot shows the 'URL' form with the following fields and annotations:

- 1**: \* URL (Required Field)
- 2**: \* Title (Required Field)
- 3**: \* Compliance Resource Type (Required Field)
- 4**: \* Key Words (Required Field)
- 5**: \* Description (Required Field)
- 6**: ☐ This resource is specific to a particular industry
- 7**: NAICS Code
- 8**: \* Document Type (Required Field)
- 9**: ☐ This resource targets small businesses
- 10**: Document Size (KB)
- 11**: Publication Date
- 12**: Sub Agency / Office

Below the form are sections for 'Agency' (Department of Transportation) and 'Submissions' (Topics Level 1, 2, 3 and Business Sectors Level 1, 2, 3). At the bottom are buttons: Add, Edit, Save, Clear, Delete, Print, Continue, and Back.

Edit a misspelled URL

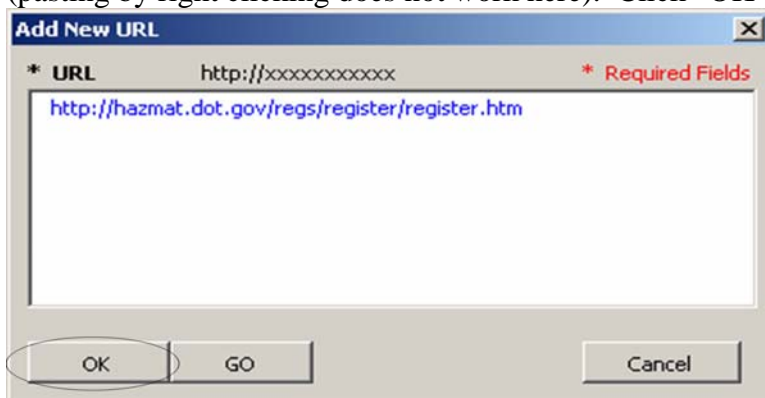
Delete a URL

Continue to the URL Topic screen

Return to the POC screen

### Add New URL Screen

Type the web address or copy a URL from the Internet and press “Ctrl-V” to paste it into the box (pasting by right clicking does not work here). Click “OK” when finished.



The screenshot shows the 'Add New URL' dialog box with the following fields and buttons:

- \* URL (Required Field): Contains the text 'http://xxxxxxxxxx' and a pasted URL 'http://hazmat.dot.gov/regs/register/register.htm'.
- Buttons: OK, GO, and Cancel.



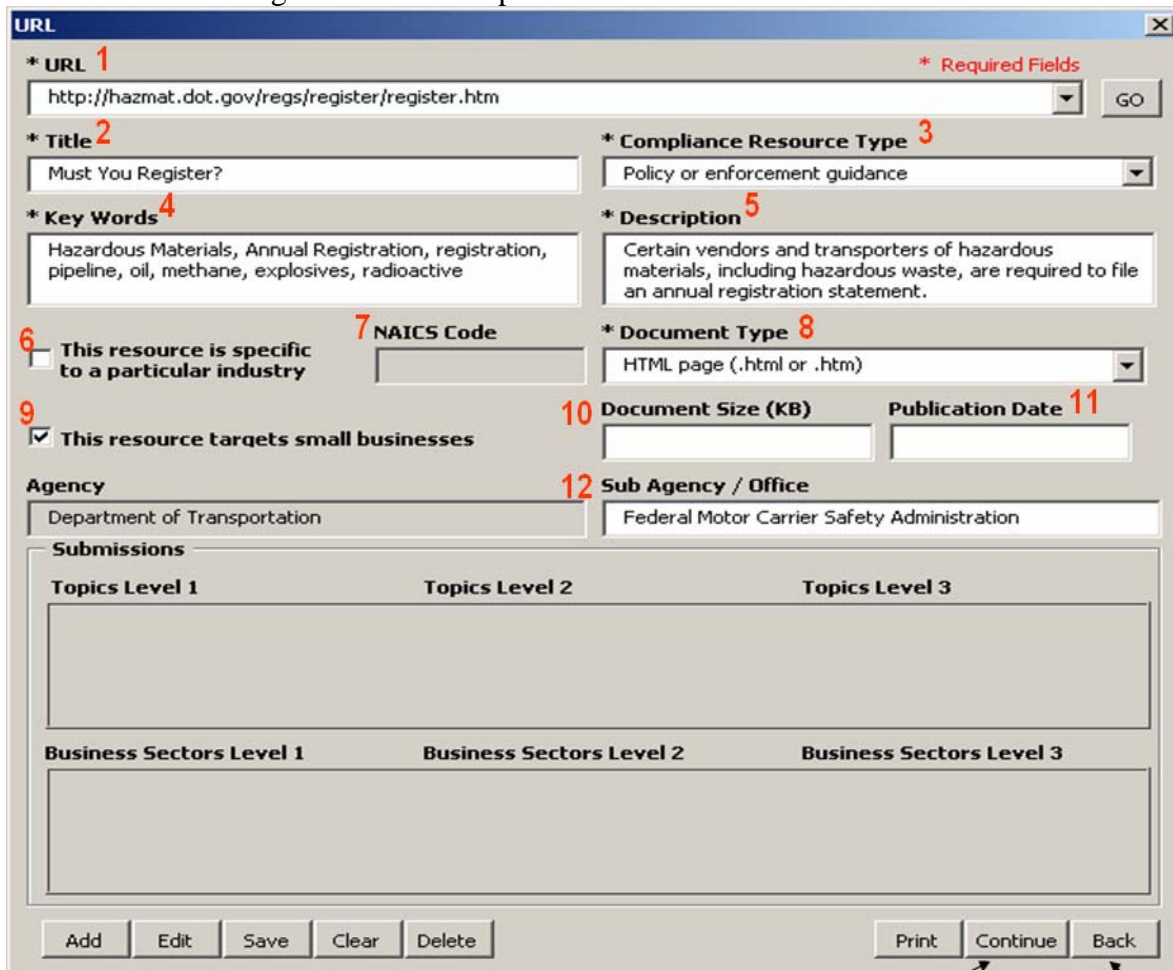
## URL Screen

For each resource added, fill in all of the required data elements.

NOTE: Always check the box next to “This resource targets small businesses” in order to meet SBPRA requirements.

NOTE: Under field 4, “Key Words,” if the resource pertains to a grant, procurement, patent or trademark, etc., list this information as one of the key words. See the data dictionary for a listing of key words you will need to include when applicable. For example, if the resource supplied guidance around a procurement topic, you would add the word ‘Procurement’ to the key word list.

Click “Continue” to go to the URL Topics Screen.



The screenshot shows a web form titled "URL" with various input fields and checkboxes. Red numbers 1 through 12 are placed next to specific fields to indicate required or important information:

- 1: \* URL (text box containing "http://hazmat.dot.gov/regs/register/register.htm")
- 2: \* Title (text box containing "Must You Register?")
- 3: \* Compliance Resource Type (dropdown menu showing "Policy or enforcement guidance")
- 4: \* Key Words (text box containing "Hazardous Materials, Annual Registration, registration, pipeline, oil, methane, explosives, radioactive")
- 5: \* Description (text box containing "Certain vendors and transporters of hazardous materials, including hazardous waste, are required to file an annual registration statement.")
- 6: This resource is specific to a particular industry (checkbox, currently unchecked)
- 7: NAICS Code (text box)
- 8: \* Document Type (dropdown menu showing "HTML page (.html or .htm)")
- 9: This resource targets small businesses (checkbox, currently checked)
- 10: Document Size (KB) (text box)
- 11: Publication Date (text box)
- 12: Sub Agency / Office (text box containing "Federal Motor Carrier Safety Administration")

Below the main form fields are sections for "Agency" (Department of Transportation) and "Submissions" (Topics Level 1, 2, 3 and Business Sectors Level 1, 2, 3). At the bottom are buttons: Add, Edit, Save, Clear, Delete, Print, Continue, and Back.

Continue to the  
URL Topic screen

Return to  
the POC  
screen

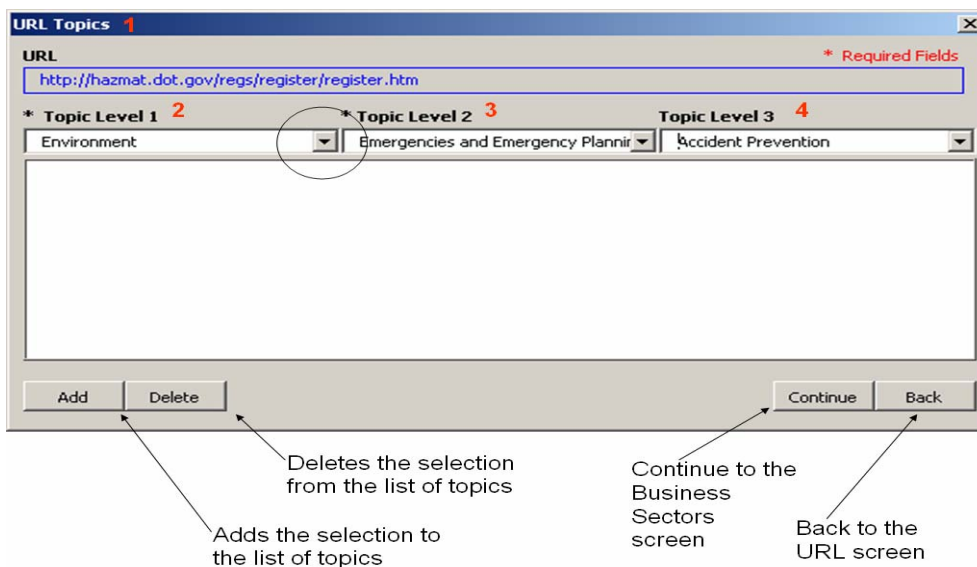


## URL Topics Screen

Choose a Topic Level 1 by clicking on the arrow

Next, choose a “Topic Level 2,” and a “Topic Level 3,” in the same manner.  
Once you are satisfied with your Topic Levels 1, 2, and 3, click on “Add.”

NOTE: If the Topic Level 2 or Topic Level 3 does not adequately describe your resource, you may add your own topic by clicking on the topic drop down box and typing a new topic. Note: you are only allowed to add five new topics per agency submission.



**URL Topics 1**

URL \* Required Fields

**\* Topic Level 1 2** **\* Topic Level 2 3** **Topic Level 3 4**

Environment  Emergencies and Emergency Plannir  Accident Prevention

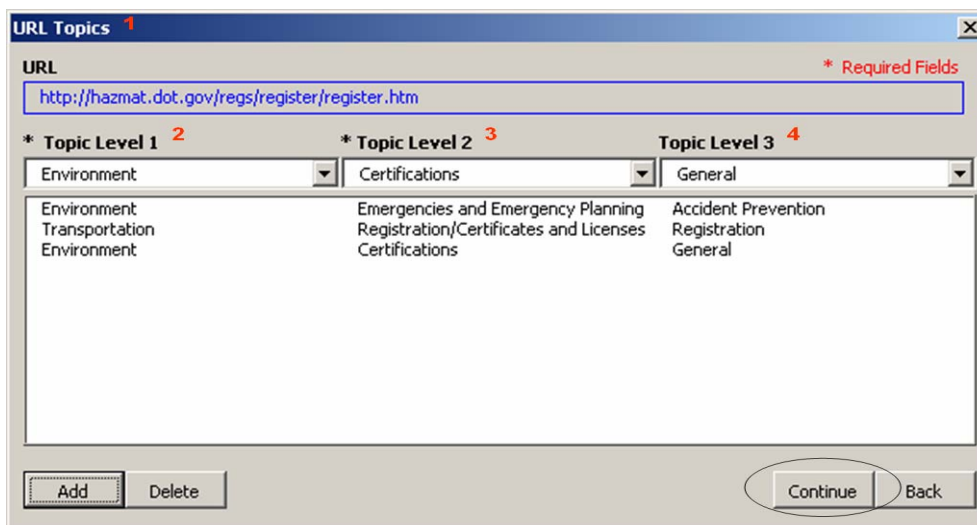
Deletes the selection from the list of topics

Adds the selection to the list of topics

Continue to the Business Sectors screen

Back to the URL screen

Add different Topic/Sub-topic combinations if the resource may be characterized in more than one way. Once you have finished adding topics, click on “Continue.”



**URL Topics 1**

URL \* Required Fields

**\* Topic Level 1 2** **\* Topic Level 2 3** **Topic Level 3 4**

Environment  Certifications  General

Environment  
Transportation  
Environment

Emergencies and Emergency Planning  
Registration/Certificates and Licenses  
Certifications

Accident Prevention  
Registration  
General



## Business Sectors Screen

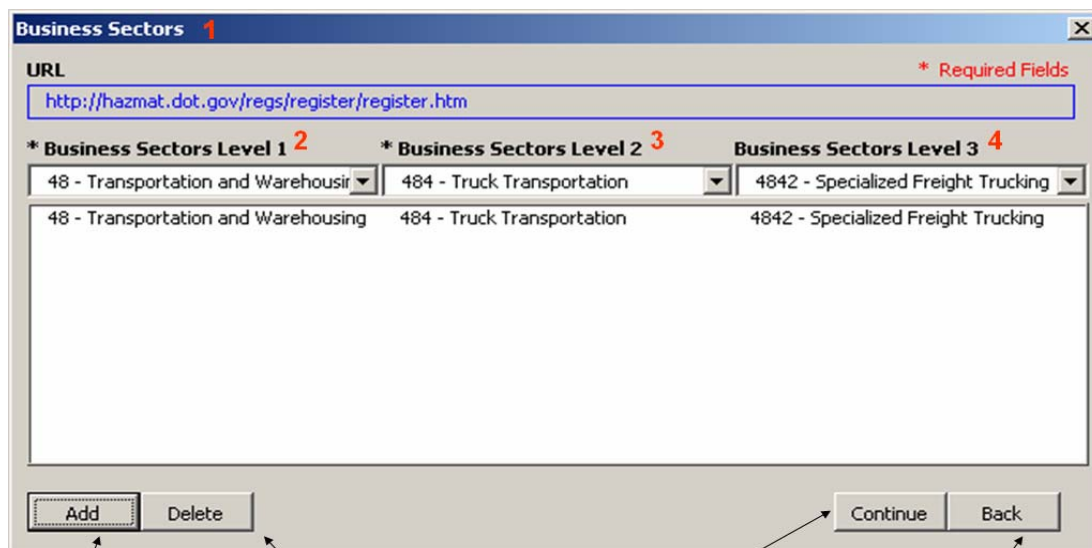
Characterize the resource according to the business sector it applies to.



To Add a Business Sector:

Choose from each of the three menus, and then click “Add.” Similar to the topic directory, you may add more than one business sector combination.

To Delete a Business Sector:

If you have mistakenly added a Business Sector description, delete by highlighting it and selecting “Delete.”



 Adds the selection to the list of Business Sectors  
 Deletes the selection from the list of Business Sectors  
 Sends you back to the beginning to add the next compliance assistance resource URL  
 Back to the URL Topics screen

Once you have finished adding business sectors, click on “Continue.”

You are now back at the original URL screen (see page 5 for screen shot), except that now all the information has been populated for the URL. Verify that the information is correct. If you want to change any of the information, click “Continue,” as before, to toggle through the screens.

If you are satisfied with the information, click “Save” and enter a new URL by clicking on the “Add” button located on the bottom left hand corner of the URL Screen (see page 5).

Repeat the above process for each new URL. Once you have added all of your business compliance assistance resources, click “Save.”

To exit the instrument, return to the POC screen and click on the red “Exit” button.



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When you have added all your agency's compliance assistance resources (URLs) return to the sending instructions section (see page 1) to complete your Agency's Data Call Response.

NOTE: Finding Compliance Assistance resources can be challenging because each agency stores them differently on their websites. To ensure that you find all your compliance assistance resources for proper submission, begin by contacting your webmaster(s), policy offices, enforcement offices, librarians, and other people that manage information within your agency. You can also execute searches on your agency's website(s) with keywords such a "Compliance Assistance" AND words that functionally relate to your agency's mission like "Motor Vehicles" or "Air" or "Benefits" or "Wage" or "Safety".